



South Carolina Association Governmental Purchasing Officials

- Beverly Horton Cummings, PMP
 - March 9, 2006
- Project Initiation and Planning



PROJECT

- A Project is a **temporary** endeavor undertaken to create a unique product, service or result.

» PMI's



Dilbert

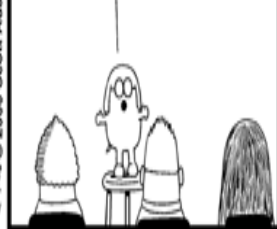
WELCOME TO DOGBERT'S SCHOOL FOR ZOMBIES AND/OR CERTIFIED PROJECT MANAGERS.



THE TRAINING IS THE SAME FOR EITHER PROFESSION. THE MAIN DIFFERENCE IS THAT ZOMBIES GET MORE SUN.

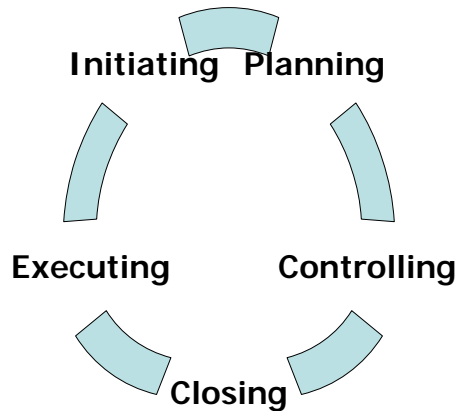


REPEAT AFTER ME:
I WANT TO CALENDAR
AN ON-SITE POST
CUTOVER SUPPORT
REVIEW MEETING.



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Project Life Cycle





Six Phases of a Project

1. Enthusiasm
2. Disillusionment
3. Panic
4. Search for the Guilty
5. Punishment of the Innocent
6. Praise and Honors for the Non-Participants



Nine Knowledge Areas

1. Integration Management
2. Scope Management
3. Time Management
4. Cost Management
5. Quality Management
6. Human Resource Management
7. Communications Management
8. Risk Management
9. Procurement Management

Code of Conduct

- Accurate and truthful
- Conflict of interest
- Confidentiality
- Inappropriate payments



Triple Constraints

- Time



- Cost



- Scope





Initiating the Project

- Project should be selected on:
 - Feasibility
 - Knowledge availability
 - Risk
 - Merit
 - Impact to organization
 - Cost
 - ROI



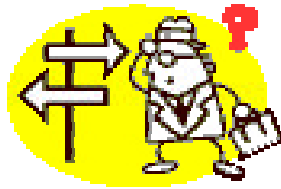
Initiation Phase

- Formal process recognize a new project
- Stakeholders are identified
- Commitment is obtained



Project Initiation Cycle

- Decision Making Cycle



Project Charter

- Formal Authorization of a Project
 - Stakeholders
 - Project Objectives
 - High Level Requirements
 - Sponsor Sign Off





Stakeholder Analysis

Who gets the reward and benefits ?

Who suffers the consequences ?

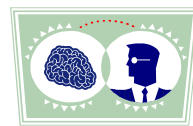
Who provides the input ?

Who gets the output ?



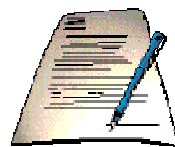
Objectives

- Specific
- Measurable
- Agreed to
- Realistic
- Time constrained
 - Review with key stakeholders!



Requirements

- Gather the information
- Review and analyze the information
- Document the requirements
- Obtain approval!



Requirements vs “Desirements”

- AVOID
 - Unclear requirements
 - Immeasurable objectives
 - Abstract benefits
- DO
 - List requirements by priorities
 - Evaluate risk
 - Align with business objectives



Sign-Off

- Present to project sponsor
- Clarify any misunderstandings
- Revise as necessary
- Obtain approval



Project Initiation

- Role Exercise





Project Plan

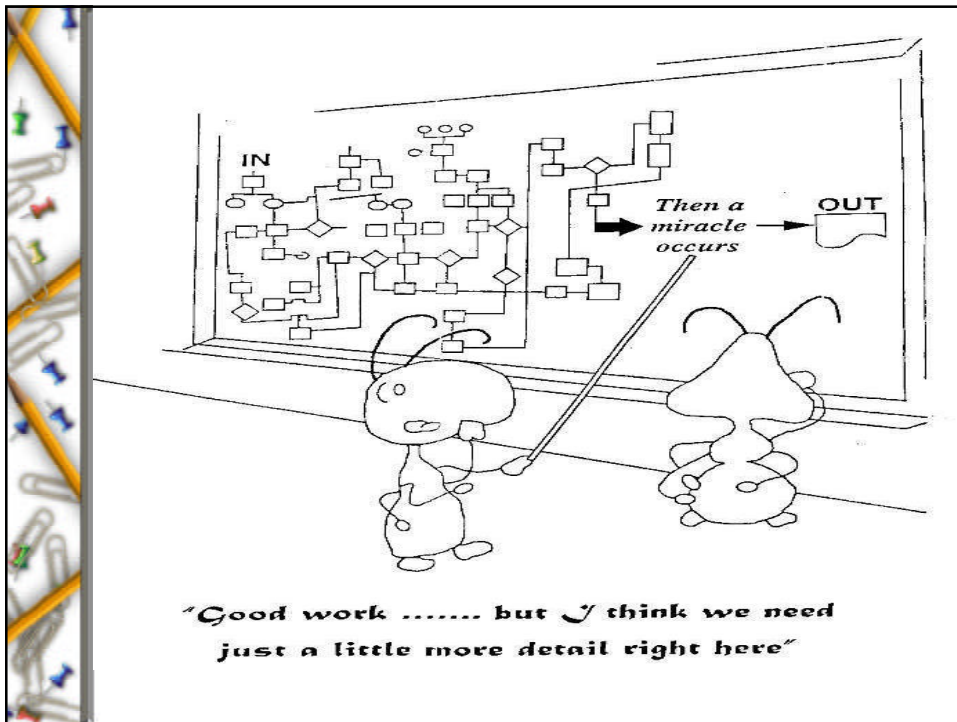
- CONTAINS:
 - Project charter
 - Work breakdown structure
 - Formal change control plan
 - Milestones
 - Responsibility matrix
 - Project team
 - Detailed communications plan



Work Breakdown Structure

- Defines the **TOTAL** scope of the project
- All the work necessary to complete objectives and **ONLY** that work





Benefits of a WBS

- Project team building
- Control scope
- Defines roles and responsibilities

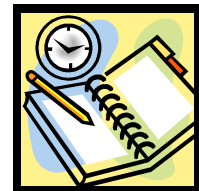


Gantt Chart

ID	Task Name	Duration	Start	Finish	Mar 5, '06
					S M T W
1	WRITING A REQUEST FOR PROPOSAL OVER \$50k	0 days	Thu 3/9/06	Thu 3/9/06	
2	Agency send requisition to ITMO	1 day?	Thu 3/9/06	Thu 3/9/06	
3	ITMO assigns requisition to procurement manager	1 day?	Fri 3/10/06	Fri 3/10/06	
4	ITMO procurement manager writes SLA	1 day?	Mon 3/13/06	Mon 3/13/06	
5	Agency approves SLA	1 day?	Tue 3/14/06	Tue 3/14/06	
6	ITMO builds solitation	5 days	Wed 3/15/06	Tue 3/21/06	
7	ITMO post solitation	1 day?	Wed 3/22/06	Wed 3/22/06	
8	Solitation Q&A	10 days	Thu 3/23/06	Wed 4/5/06	
9	ITMO post amendment to Q&A	1 day?	Thu 4/6/06	Thu 4/6/06	
10	ITMO opens solitation	16 days	Fri 4/7/06	Fri 4/28/06	
11	ITMO conducts evaluation panel briefing	7 days	Mon 5/1/06	Tue 5/9/06	
12	Evaluation panel reviews the proposals	10 days	Wed 5/10/06	Tue 5/23/06	
13	Evaluation panel scores the proposals	1 day?	Wed 5/24/06	Wed 5/24/06	
14	Vendor demo from high ranking offers	5 days	Thu 5/25/06	Wed 5/31/06	
15	Evaluation panel final scoring	3 days	Thu 6/1/06	Mon 6/5/06	
16	ITMO negotiation offer with highest ranked offer	5 days	Tue 6/6/06	Mon 6/12/06	
17	ITMO issues intent to award statement	1 day?	Tue 6/13/06	Tue 6/13/06	
18	Intent statement becomes a contract	16 days	Wed 6/14/06	Wed 7/5/06	

Project Schedule

- List all activities and their anticipated duration
 - Must be realistic
 - Available resources/effort
 - Constraints must be reviewed



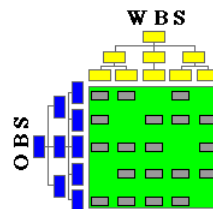
Controlling Change

- Plan early
- Change can be beneficial
- Have a formal change management system



Milestones

- Define most important milestones
 - Review with project team
 - Report current status
- Identify milestones with greatest risk
 - What are the dependencies
 - Monitor schedule
- Obtain Acceptance



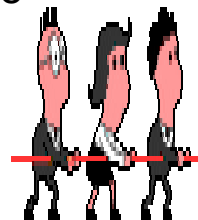
Responsibility Matrix


- Relates the scope of work to an individual
 - Role
 - Responsibility
 - Reporting relationship



Team


- Support from upper management
- Commitment to achieve project's goals
- Clear expectations
- Required skills and knowledge






Team Building



- Brainstorming
- Group Think
- Personality Preferences and Motivation





Team Building

- Positive
 - Interesting and stimulating
 - Recognition of accomplishment
 - Personal growth potential
- Barriers
 - Unclear project objectives
 - Shifting goals and priorities
 - Power struggle and conflict





Communications Plan

Who ?

What ?

How ?



Effective Communication

- Do
 - Get feedback
 - Hold effective meetings
 - Report honestly
- Don't
 - Assume
 - Manage by memo
 - Hold back information

